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Slide notes

Welcome to the Workers' Compensation Medicare Set-Aside Portal (WCMSAP) Account Setup course.

Note: This module is intended for corporate WCMSAP account users. A corporate account indicates that the submitter is a corporate entity with an Employer Identification Number (EIN) and will be regularly submitting WCMSA requests.

As a reminder, you may view the slide number you are on by clicking on the moving cursor. Additionally, you can view the narration by clicking the Closed Captioning [CC] button in the lower right hand corner of the screen.

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Disclaimer

While all information in this document is believed to be correct at the time of writing, this Computer Based Training (CBT) is for educational purposes only and does not constitute official Centers for Medicare & Medicaid Services (CMS) instructions for the WCMSAP. All affected entities are responsible for following the applicable CMS instructions found at the following link: http://www.cms.gov/WorkersCompAgencyServices/.

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This course will demonstrate how to complete the Account Setup, including establishing an account and a Login Identification (ID) and password. This course will also describe the next steps to follow once the Account Setup has been submitted.

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Getting Started

- Corporate entity must identify Account Manager
- Account Manager completes Account Setup as long as
    - Corporate entity has completed New Registration step
    - Authorized Representative has received mailing from Coordination of Benefits Contractor (COBC) containing
        - Personal Identification Number (PIN)
        - Account ID/Submitter ID

Slide notes

To begin, the corporate entity must identify their Account Manager. The Account Manager is responsible for completing the Account Setup.

The Account Manager may initiate the Account Setup if the corporate entity has already completed the New Registration step and their Authorized Representative

has already received a mailing from the Coordination of Benefits Contractor (COBC) containing the Personal Identification Number (PIN) and Account ID/Submitter ID.

The Account Manager will need this information to complete the Account Setup.

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During Account Setup, information for the corporate entities' Account Manager will be recorded. Each WCMSAP account can only have one Account Manager.

This is the individual who controls the administration of the account and manages the overall process.

The Account Manager may choose to manage the entire account or may invite other company employees to assist in this process.

For more information on the Account Manager's role, please see the Basic Functions for Account Managers CBT.

Note: A COBC Electronic Data Interchange (EDI) Representative will handle the reassignment of an Account Manager if an Account Manager needs to be changed for an account.

Slide 6 - Slide 6
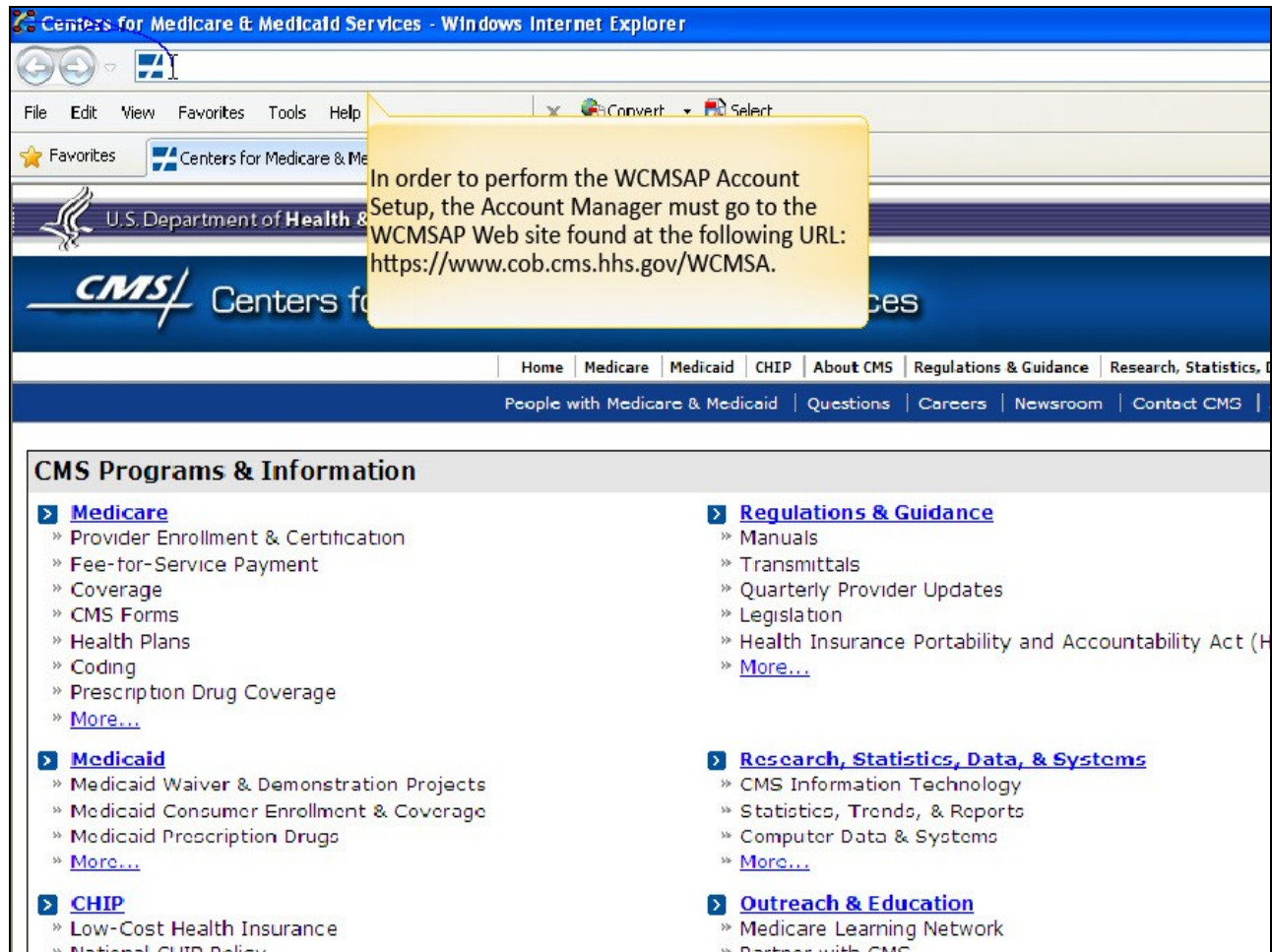
Slide notes

In order to perform the WCMSAP Account Setup, the Account Manager must go to the WCMSAP Web site found at the following URL: https://www.cob.cms.hhs.gov/WCMSA.

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Slide notes

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Each time you visit the WCMSAP Web site, the Login Warning page will display the Data Use Agreement (DUA). The DUA provides information about WCMSAP security measures including access, penalty and privacy laws.

You must agree to the terms of this warning each time you access the WCMSAP application.

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You must review the DUA and click the [I Accept] link at the bottom of the page to continue. Otherwise, you will be denied access to the WCMSAP site and will be unable to complete Account Setup.

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Once you have clicked on the I Accept link, you will be brought to the Login (Welcome) page.

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To begin this process, your designated Account Manger must click the Account Setup button.

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Slide notes

The Account Setup Intro page will display. This page describes the Account Setup process and informs you of your duties as the Account Manager.

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Slide notes

Read the introduction, then click Next to continue with the Account Setup process.

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Slide notes

The Account Setup page will display.

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Slide notes

This page requires the Account Manager to enter the Account ID and PIN that were mailed to the corporate Authorized Representative. The Account Manager's e-mail address is also required in order to verify that he/she is an authorized user.

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Slide notes

When this page is completed, click Next to continue.

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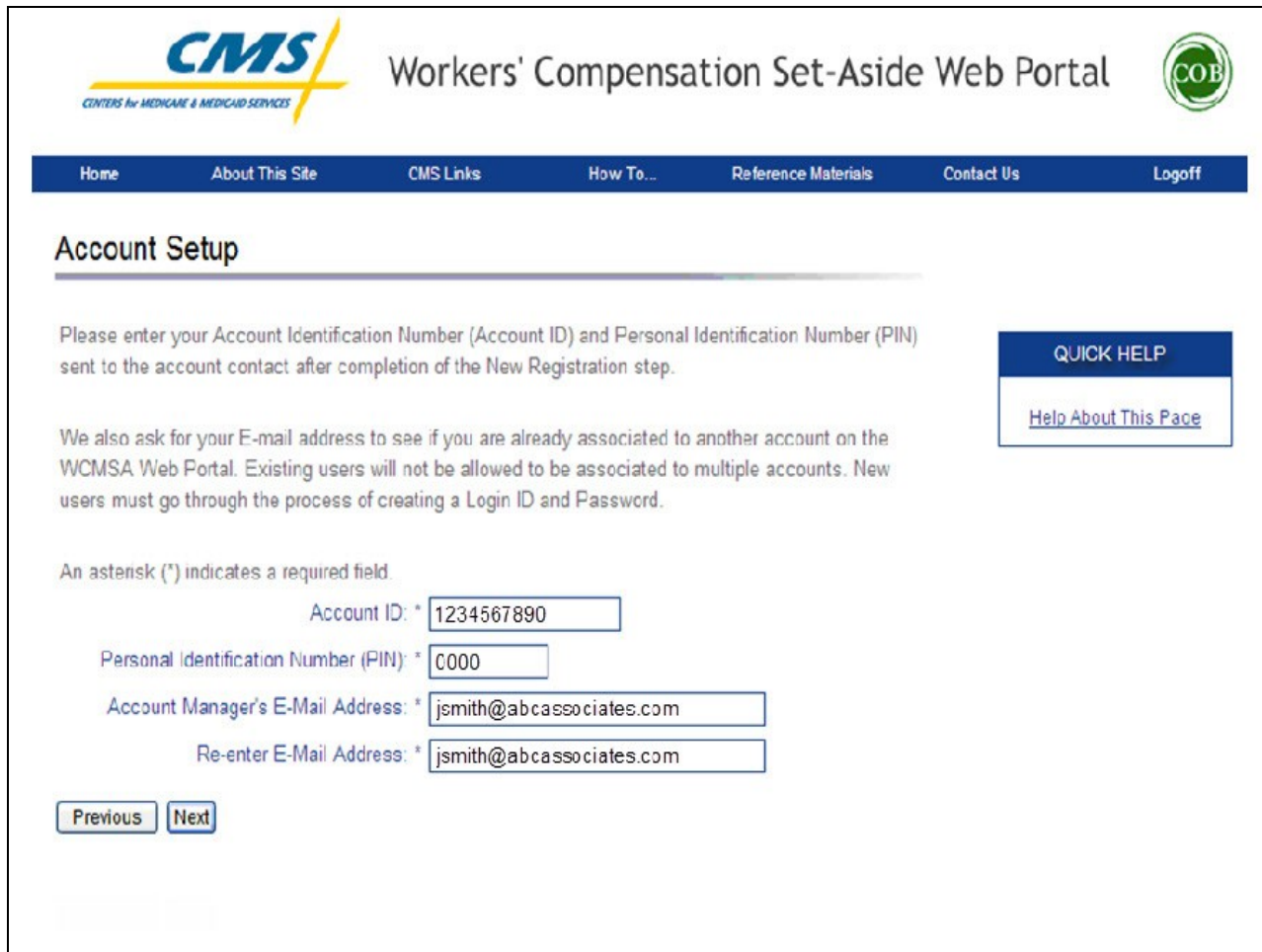
Slide notes

The system will validate the Account ID and PIN. If the Account ID and/or PIN are invalid, the system will display an error message.

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Slide notes

The system will also validate your e-mail address to determine if you already have a Login ID. If the system detects you are already associated with another WCMSAP account, as either an Account Manager or Account Designee,

the system will prevent you from registering as the Account Manager for this account.

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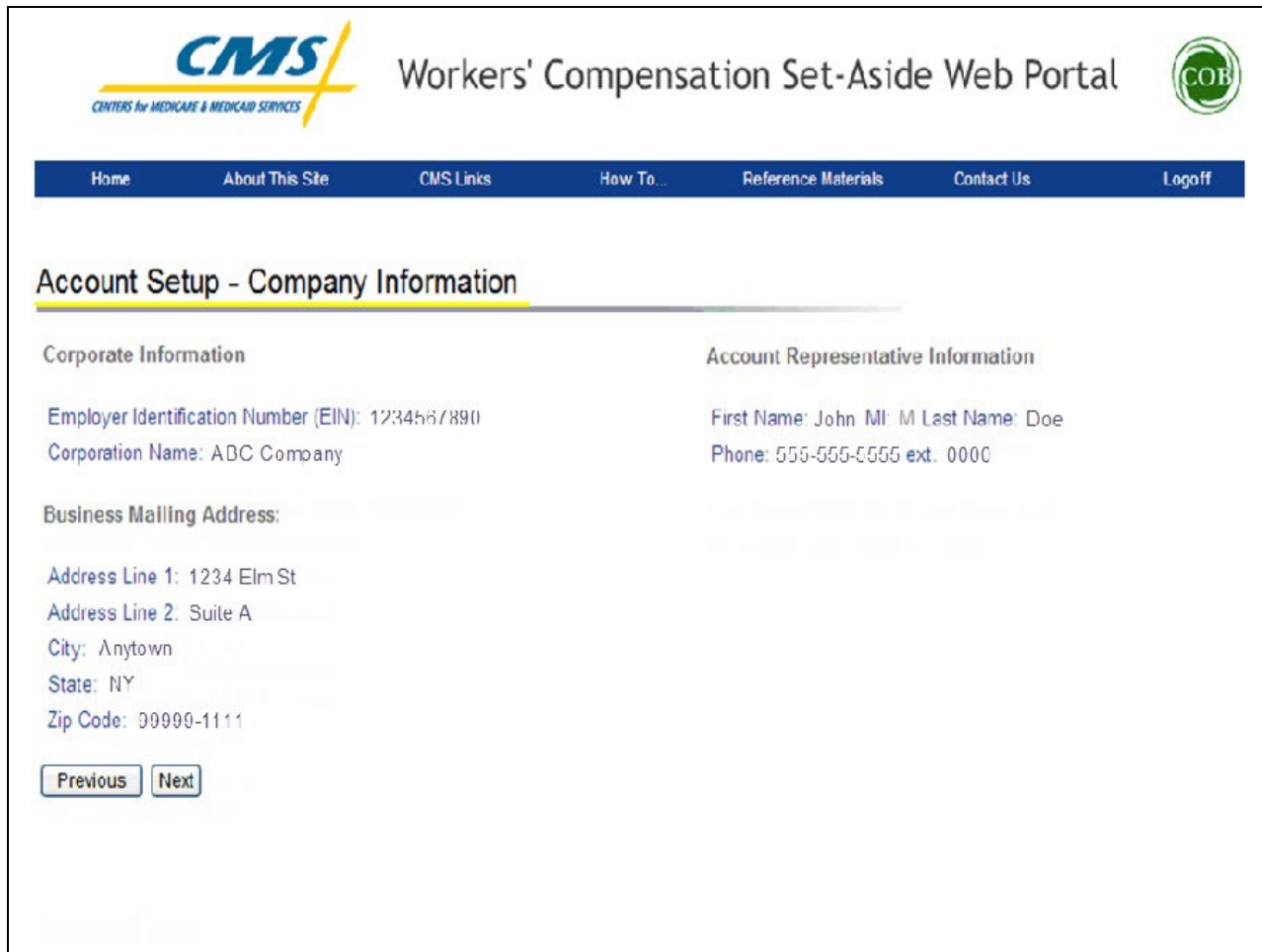**Slide notes**

Additionally, if the system detects that another user is already registered as the Account Manager for the same account you are trying to register for, the system will display an error message.

The error message will inform you that you cannot register and it will instruct you to contact the COBC.
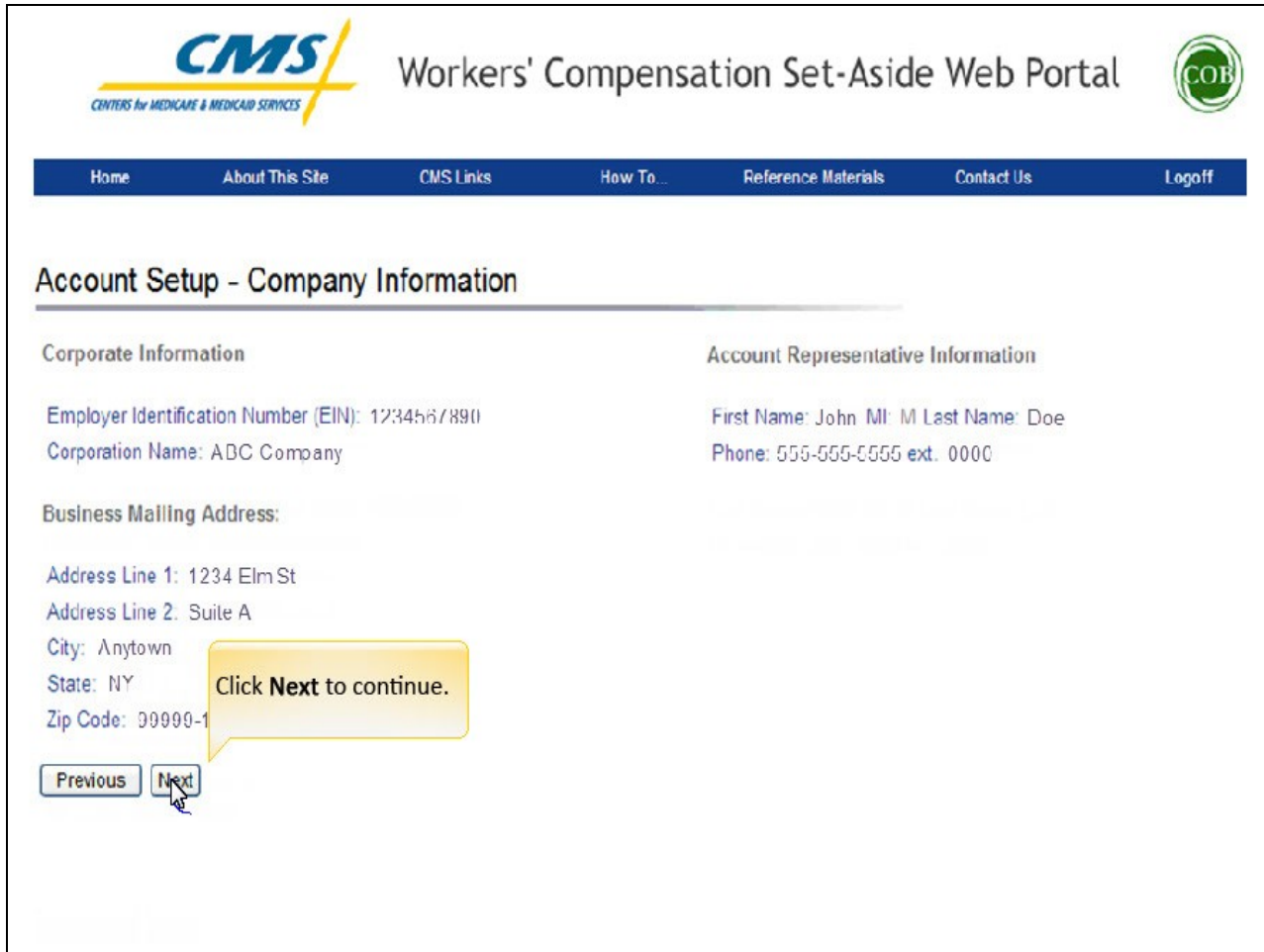
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Slide notes

If the system is able to validate all entered data, the Account Setup Company Information page will display. This screen will be pre-filled with the company information entered during the initial Registration process.

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Review the listed information. If any of this information is incorrect, contact a COBC EDI Representative to have it corrected. Click Next to continue.

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Slide notes

The Account Manager Personal Information page will display. The information entered on this page is required for subsequent communications. All fields denoted by an asterisk (*) are required.

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Slide notes

The e-mail Address field will be populated with the Account Manager e-mail address that was entered on the Account Setup page.

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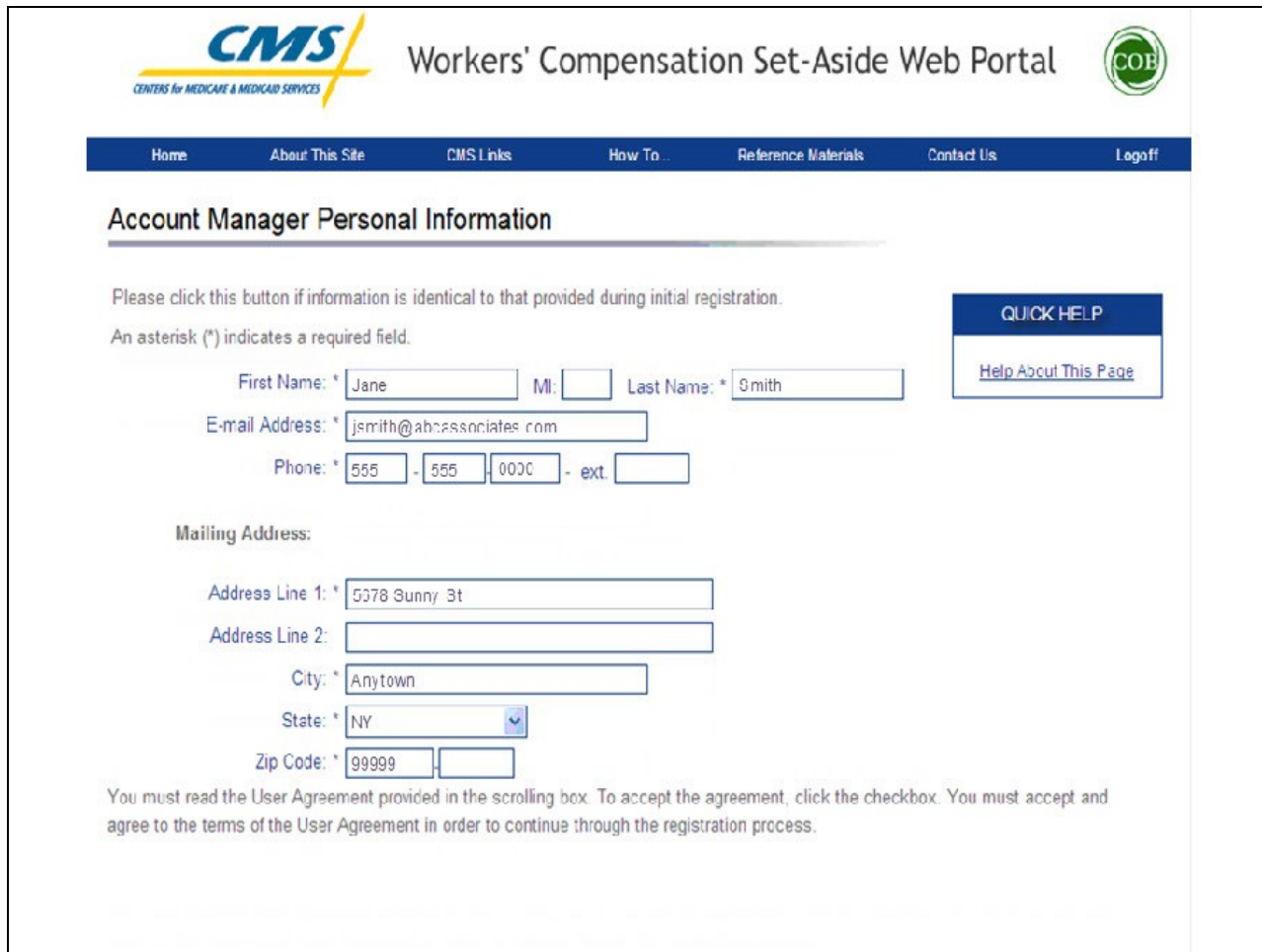
Slide notes

Enter the required personal information.

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Slide notes

When the Account Manager information has been entered, scroll down to view the User Agreement and Privacy Policy. Accept the User Agreement, then click Next. The system requires you to click "I accept" in order to continue the Account Setup.

Note: You can register as an Account Manager for an account if you are already a registered Medicare, Medicaid, and SCHIP Extension Act of 2007 (MMSEA) Mandatory Reporting user.

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The system will confirm that all required fields have been entered before allowing you, the Account Manager, to continue with the Account Setup process.

The system will display an error message if you submit incomplete or invalid information (i.e., the entered information does not pass the WCMSAP edits).

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If you are a new user, the Account Manager Login Information page displays.

Note: If you have already registered to use the WCMSAP, this page will not display and you will not be prompted to create a Login ID and Password.

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New users must set up a Login ID and Password (using the following guidelines):

Login IDs must be 7 characters

Login IDs must be in the format of AA999AA

Login ID and Password cannot be the same

Passwords must be changed every 60 days

Passwords must be 8 characters in length

Passwords must contain at least one upper case letter, one lower case letter, one number, and one special character

Passwords cannot be changed more than once per day

Passwords cannot contain 4 consecutive characters from the previous password

Passwords must be different from the last 6 Passwords

Passwords cannot contain a reserved word

(Password, welcome, hcfa, cms, system, medicare, medicaid, temp, letmein, god, sex, money, quest, 1234, or f20asya, ravens, redskin, orioles, bullets, capitol, Maryland, terps, doctor,

567890, 12345678, root, bossman, january, february, march, april, may, june, july, august, september, october, november, december, ssa, firewall, citic, admin, unisys, pwd, security, 76543210, 43210, 098765,

 iraq, ois, tmg, internet, intranet, extranet, att, Lockheed)

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Slide notes

The security information requested on this page will allow the system to authenticate your identity each time you log in to the WCMSAP. Choose your Login ID and Password carefully.

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Slide notes

Create your Login ID, and enter and re-enter a Password. You will use your Login ID and Password to enter the WCMSAP site and manage the account, manage designees, create and view cases, and upload file attachments.

The Security Questions will allow you to access your Login ID and reset your Password in the event you forget either one.

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When you have completed the Account Manager Login Information page, click Next to continue.

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The Account Manager Summary page will display next. This page shows all of the information entered during Account Setup.

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You may print this page for your records.

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All information should be reviewed and verified before continuing. You may return to specific sections to correct or change the previously entered information by clicking the Edit button next to the section that needs to be modified.

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This will return you to the applicable page (Personal Information, Mailing Address or Login ID) to make modifications. Once all corrections have been made, click Next at the bottom of that page to navigate back to the Account Manager Summary page.

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After you have verified that all entered information is correct, click the Submit Account Setup button to submit the information.

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The system will display a Thank You page with instructions for your next steps after successful Account Setup.

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Slide notes

Click the Workers' Compensation Medicare Set-Aside Welcome Page link to return to the Welcome page.

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Slide notes

You have successfully setup the account and registered yourself as the Account Manager. As the Account Manager, you control the administration of the WCMSAP account.

You will receive a Profile Report from the COBC via e-mail, which must be reviewed for accuracy then signed and returned to the COBC. You cannot submit, view, or create cases until the signed Profile Report is received by the COBC.

After the report has been received by the COBC, you can login to the account to maintain account and case information, upload and replace documents, submit cases, and manage Designee access.

You may choose to manage the entire account or you may invite other company employees to assist as Account Designees.

To add Designees, you must login to the WCMSAP site using the Login ID and Password you created during the Account Setup process.

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Slide notes

Upon completion of all information for the Account Setup, an e-mail notification will be sent to you and the Account Representative. The e-mail will also include a Profile Report, noting all information previously recorded during registration,

and any additional information provided during the Account Setup. It may take up to 10 business days to receive the Profile Report. Contact the COBC EDI Department if you do not receive a Profile Report after 10 business days.

You or the Account Representative will have 60 business days to review, sign, and return the Profile Report to the COBC. When returning the signed Profile Report via e-mail, use "WCMSAP Profile Report" in the subject line.

 If a signed Profile Report is not received within that timeframe, the account will be automatically deleted on the 60th business day. If the account is deleted, you must start the registration process from the beginning.

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Slide notes